Background Check Imaging

Note: In order to add images, an assignment to the case/provider is not needed. However, additional security is needed for the Imaging Search page.

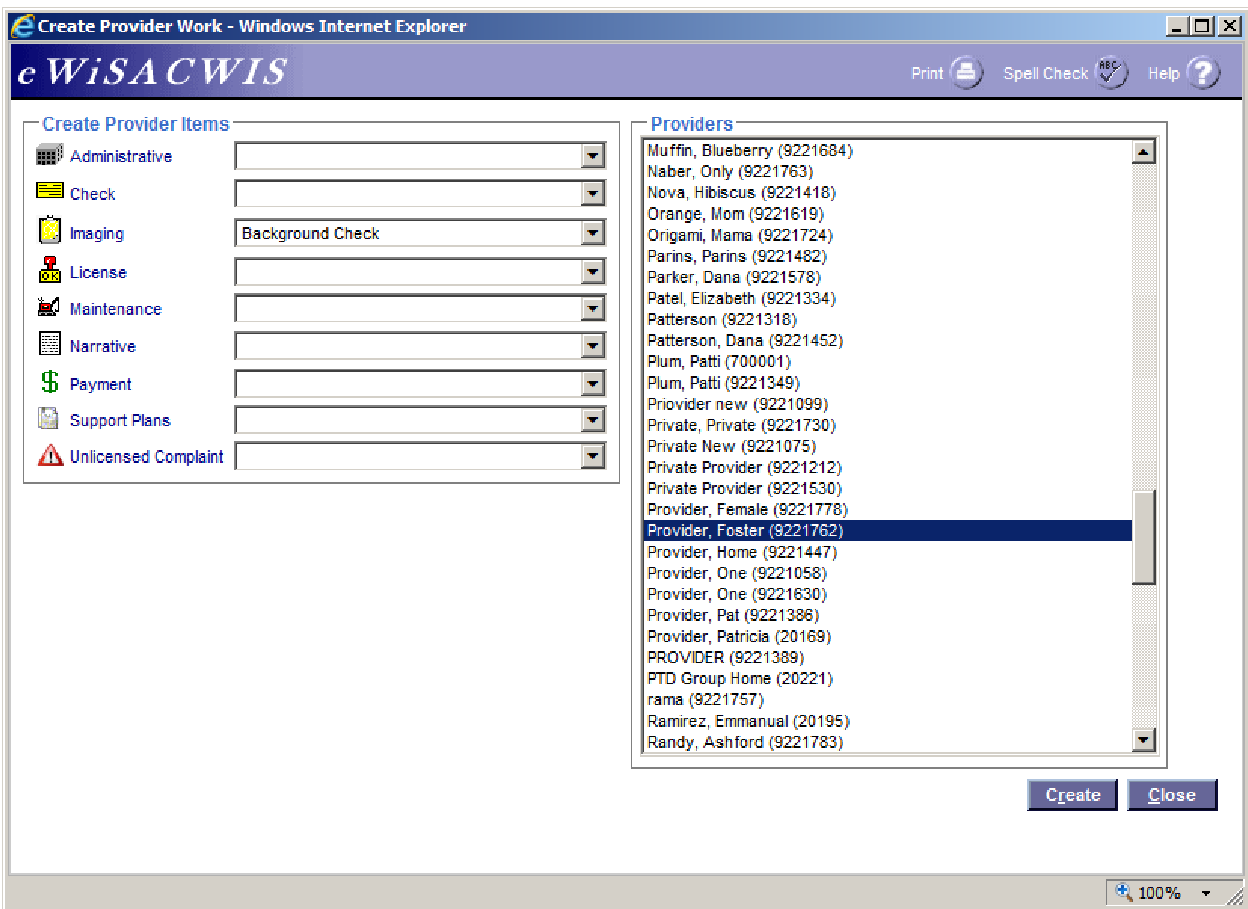
Note: Please see the Provider Imaging Quick Reference Guide on how to add other imaging documents to providers.

If you have an assignment to the provider:

1. From your desktop, click on the Provider Work icon 

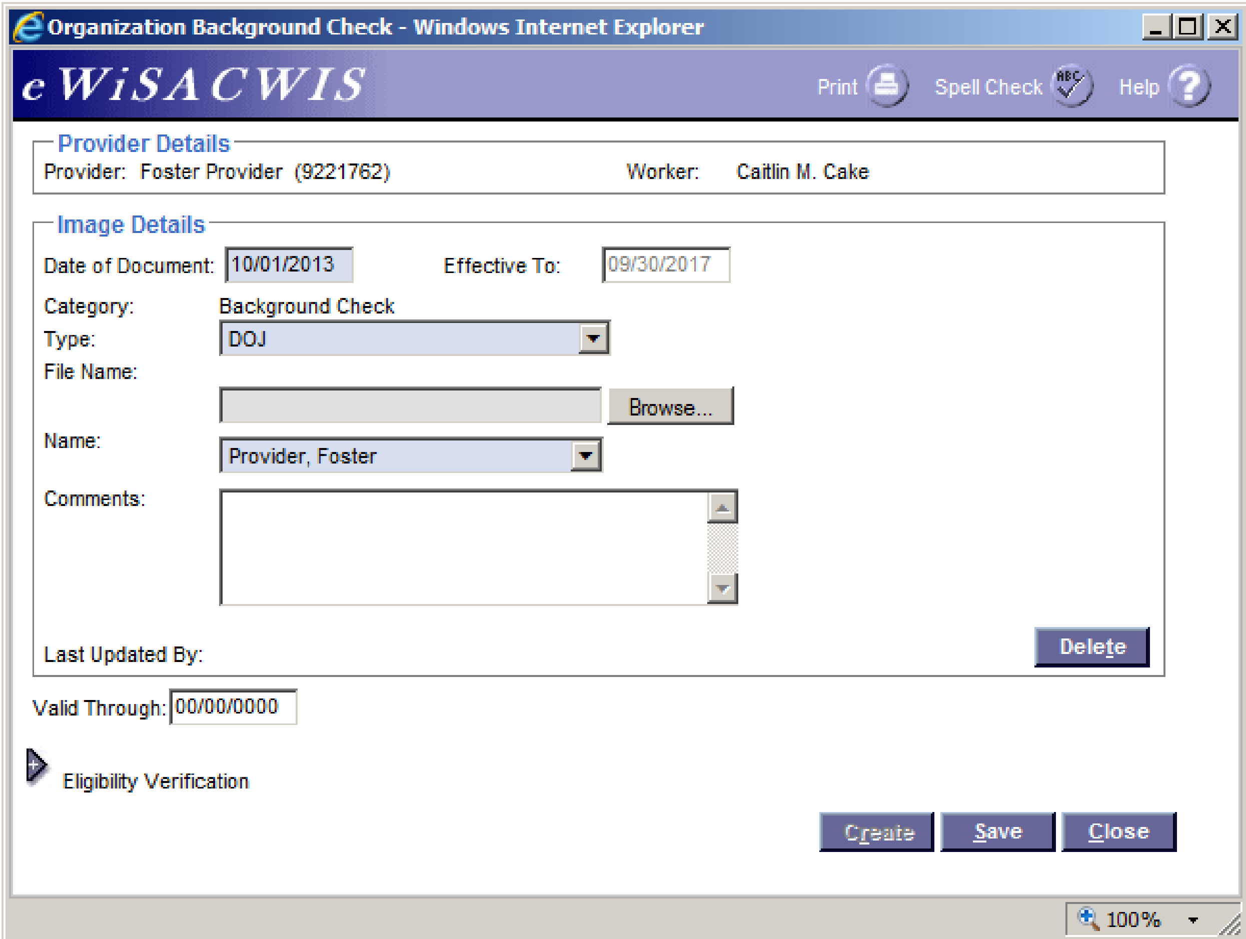
. This will open the Create Provider Work page.

2. On the Create Provider Work page, select 'Background Check' from the Imaging drop-down, select the Provider, and click Create. This will open the Organization Background Check page.

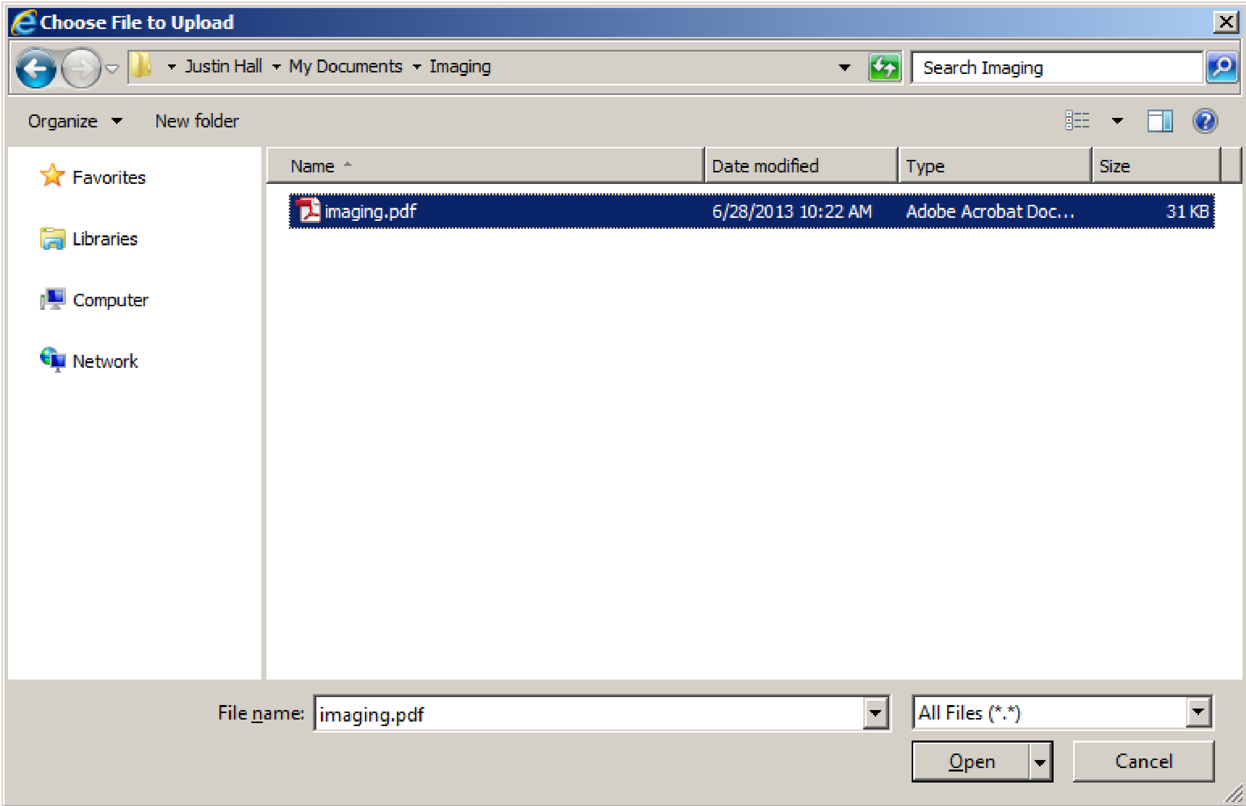


3. On the Organization Background Check page, enter the Date of the Document and the Effective To date, if applicable.

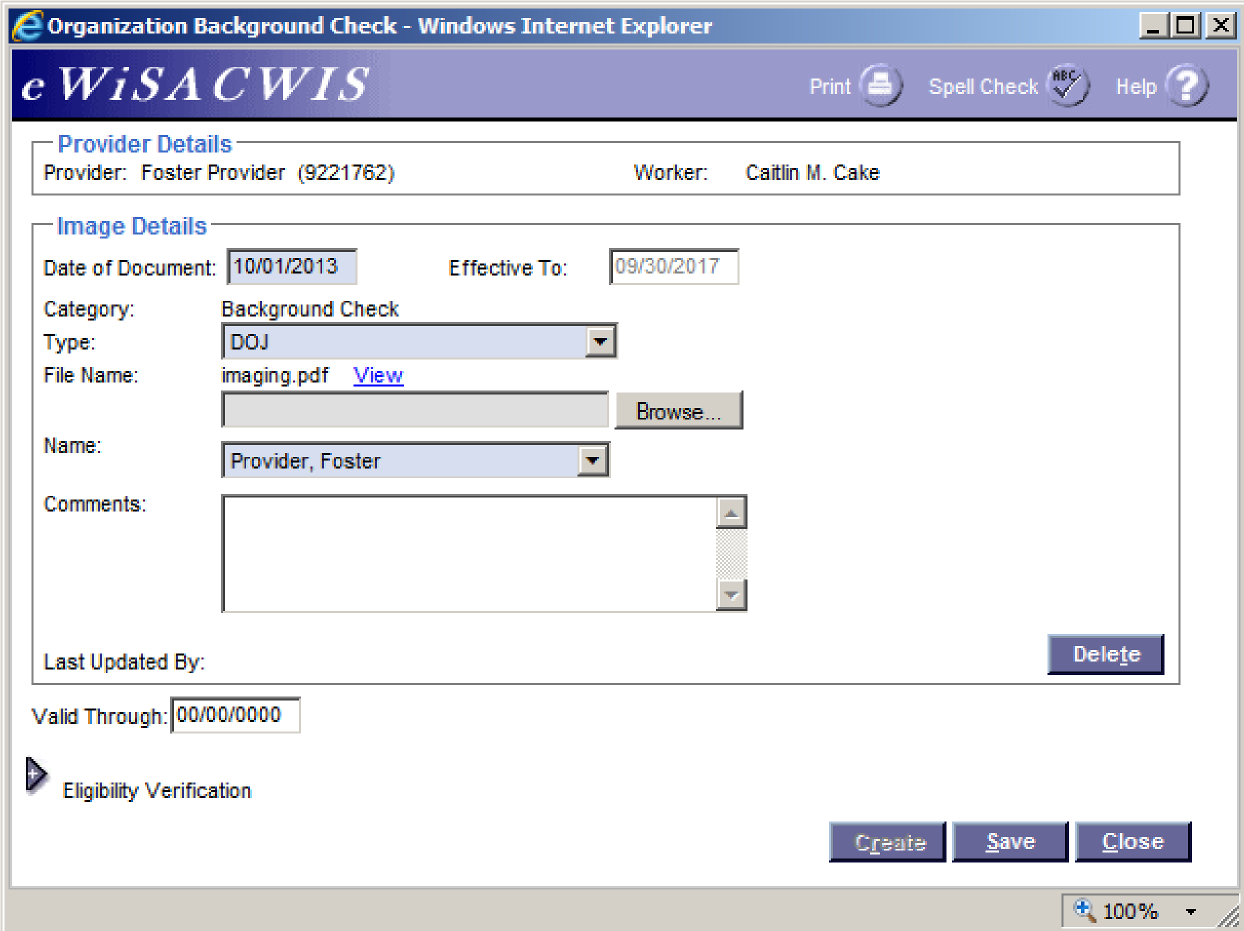
   Note: If the Type DOJ or IBIS is selected, the Effective To date will pre-fill to 4 years and will not be editable.



4. To attach a previously scanned document, select the Browse button. This will open the Choose File to Upload pop-up page. Select the scanned file from the appropriate location/folder. Once the file is selected, click the Open button.



Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 10 MB.



5. You can view the document by selecting the View hyperlink next to the File Name.

6. In the Name drop-down, select the provider member for whom the background check is for. Enter any comments in the Comments field.

7. The Valid Through date identifies when a background check is no longer applicable or effective when the date is prior to the Effective To date. The date is used in revoked or closed license scenarios.

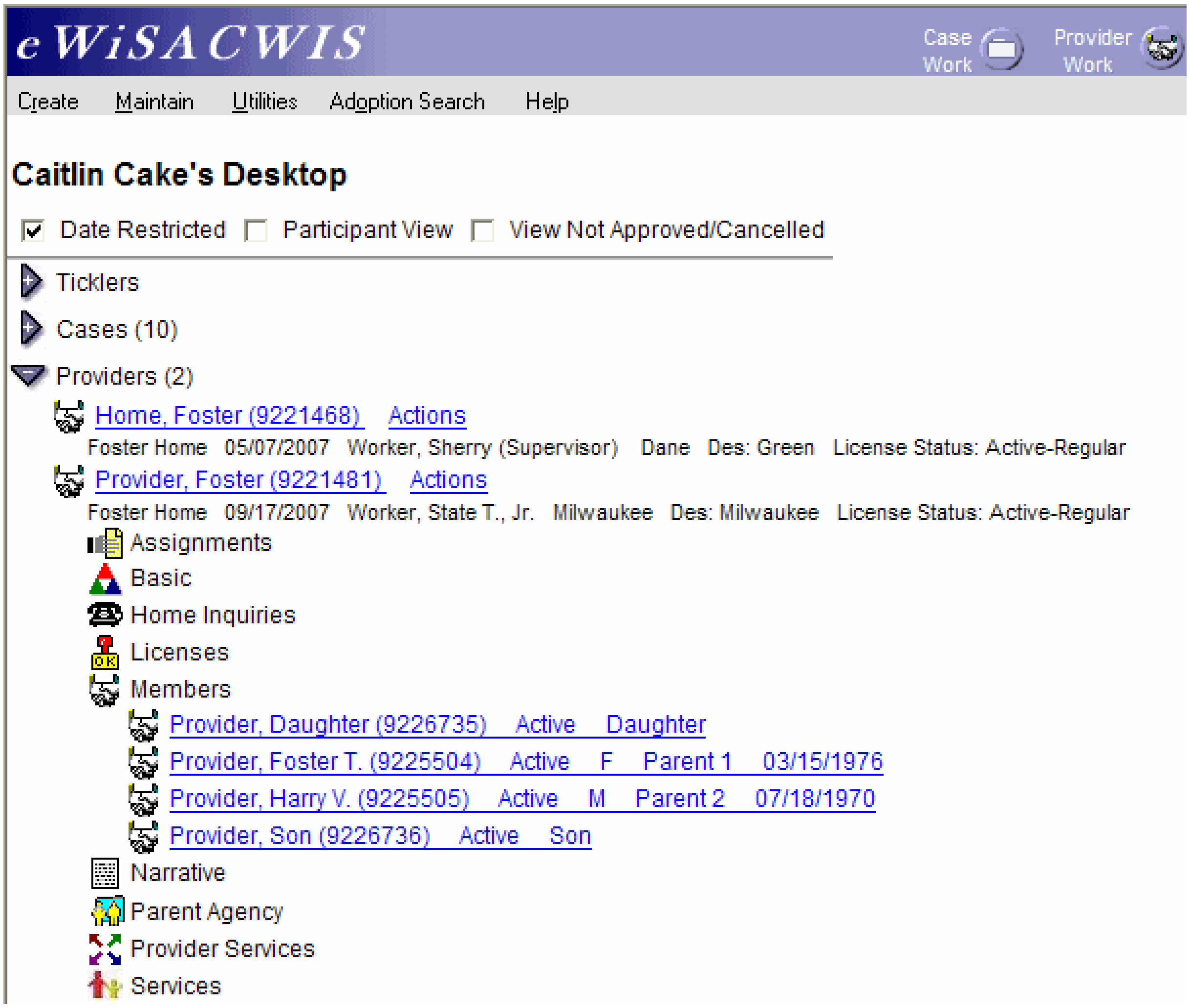
8. When all required fields have been completed, click Save. After clicking save, your name will appear in the Last Updated By field.

9. If the background check has been added to the wrong provider record, click Delete to remove the image. If the background check has been added to the wrong provider member, update the Name drop-down with the correct provider member.

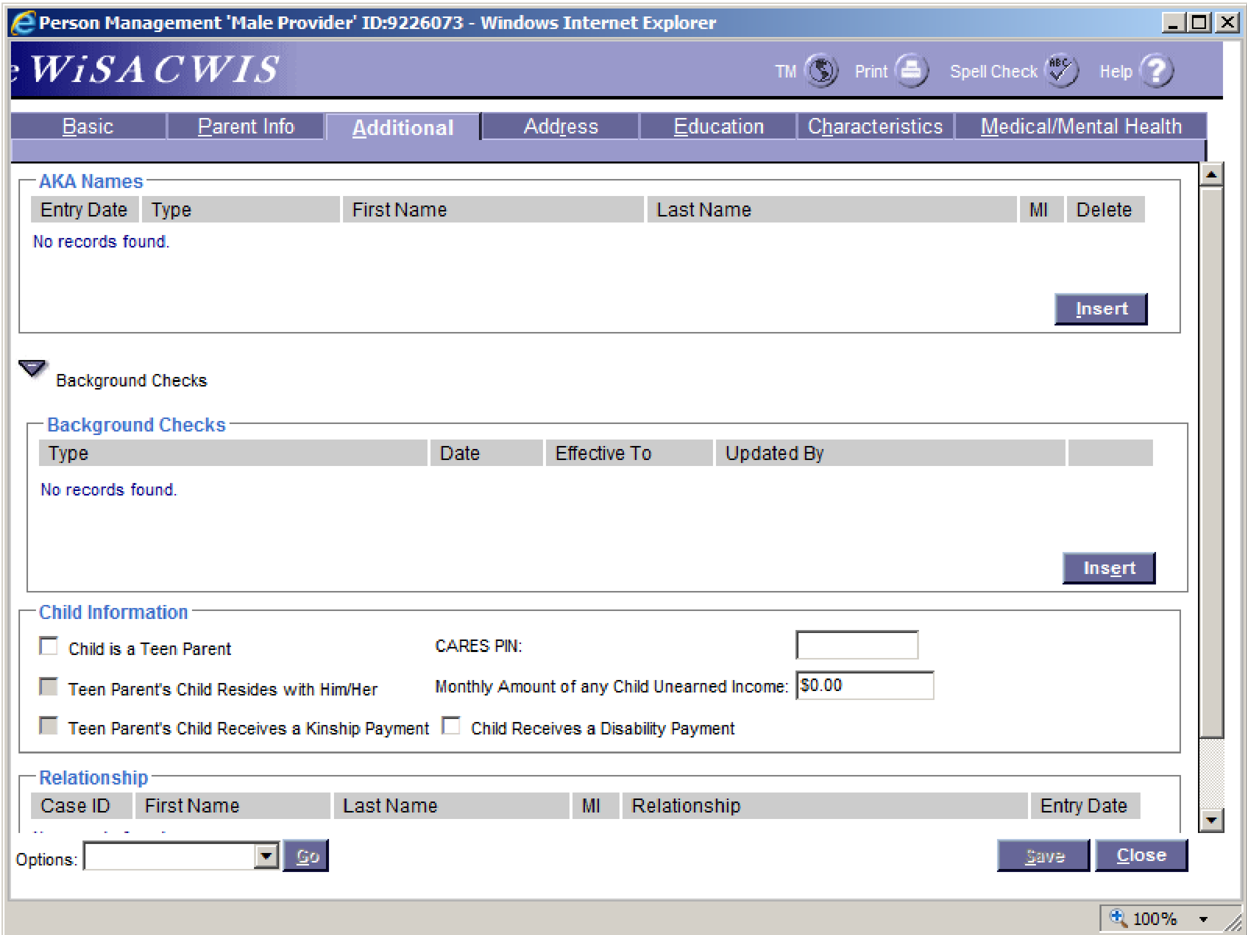
10. At this point, you can add a new background check for this provider by selecting the Create button.

Adding a Person background check if you have an assignment to the provider:

1. From your desktop, click on the Providers expando. Click on the icon next to the provider for which you would like to add the background check. Click on the Members icon to expand the Members. Click on the hyperlink for the person you would like to add the background check for. This will open the Person Management page.

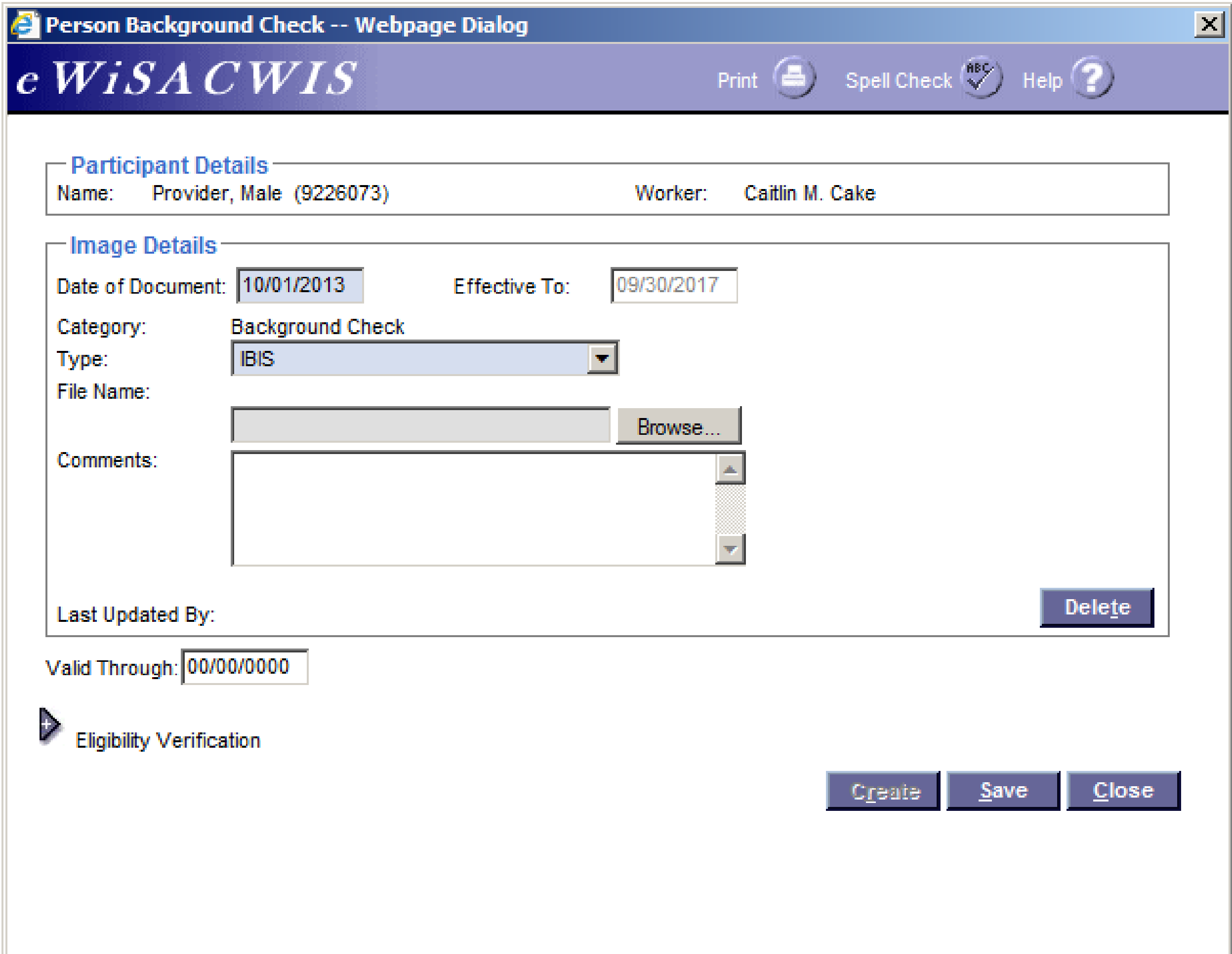


2. On the Person Management page, click the Additional tab. Click on the Background Checks expando. In the Background Checks group box, click the Insert button. This will open the Person Background Check page.



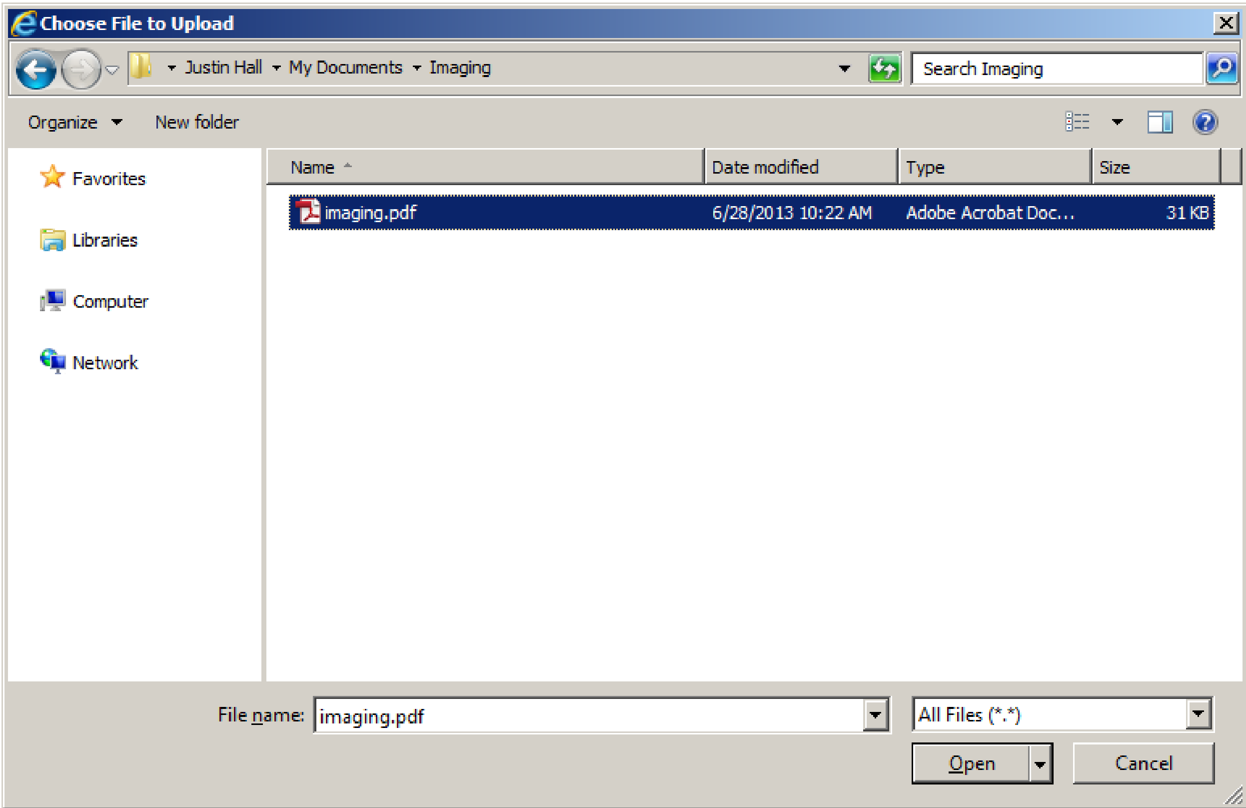
3. On the Person Background Check page, enter the Date of the Document and the Effective To date, if applicable.

Note: If the Type DOJ or IBIS is selected, the Effective To date will pre-fill to 4 years and will not be editable.

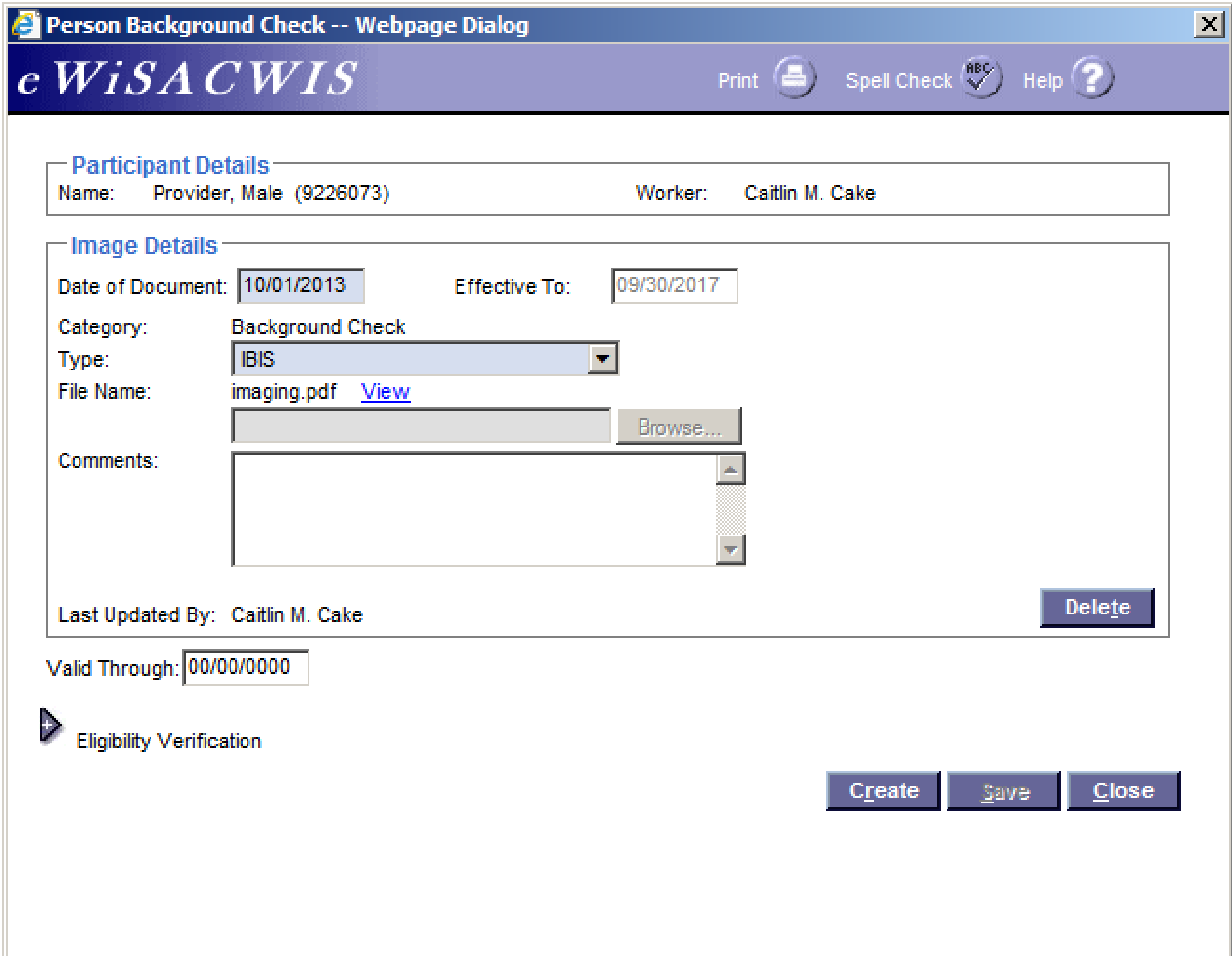


4. To attach a previously saved background check, select the Browse button. This will open the Choose File to Upload pop-up page.

5. On the Choose File to Upload page, select the file from the appropriate location/folder. Once the file is selected, click the Open button.



Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 10 MB.



6. You can view the document by selecting the View hyperlink next to the File Name.

7. Enter any comments in the Comments field.

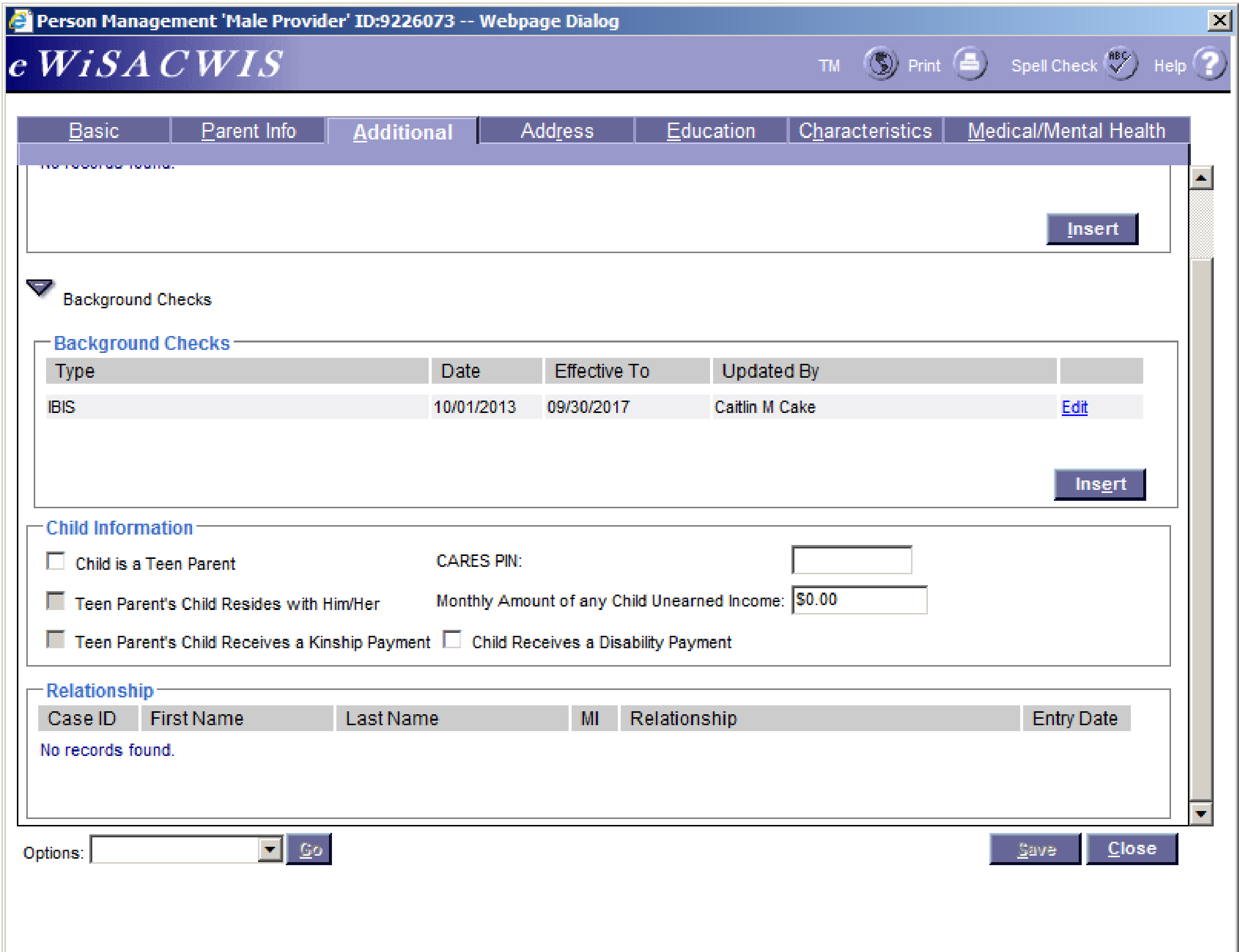
8. The Valid Through date identifies when a background check is no longer applicable or effective when the date is prior to the Effective To date. The date is used in revoked or closed license scenarios.

9. When all required fields have been completed, click Save. After clicking save, your name will appear in the Last Updated By field.

10. At this point, you can create a new background check for this provider member by selecting the Create button. If the image is incorrect for any reason, click Delete to remove the image.

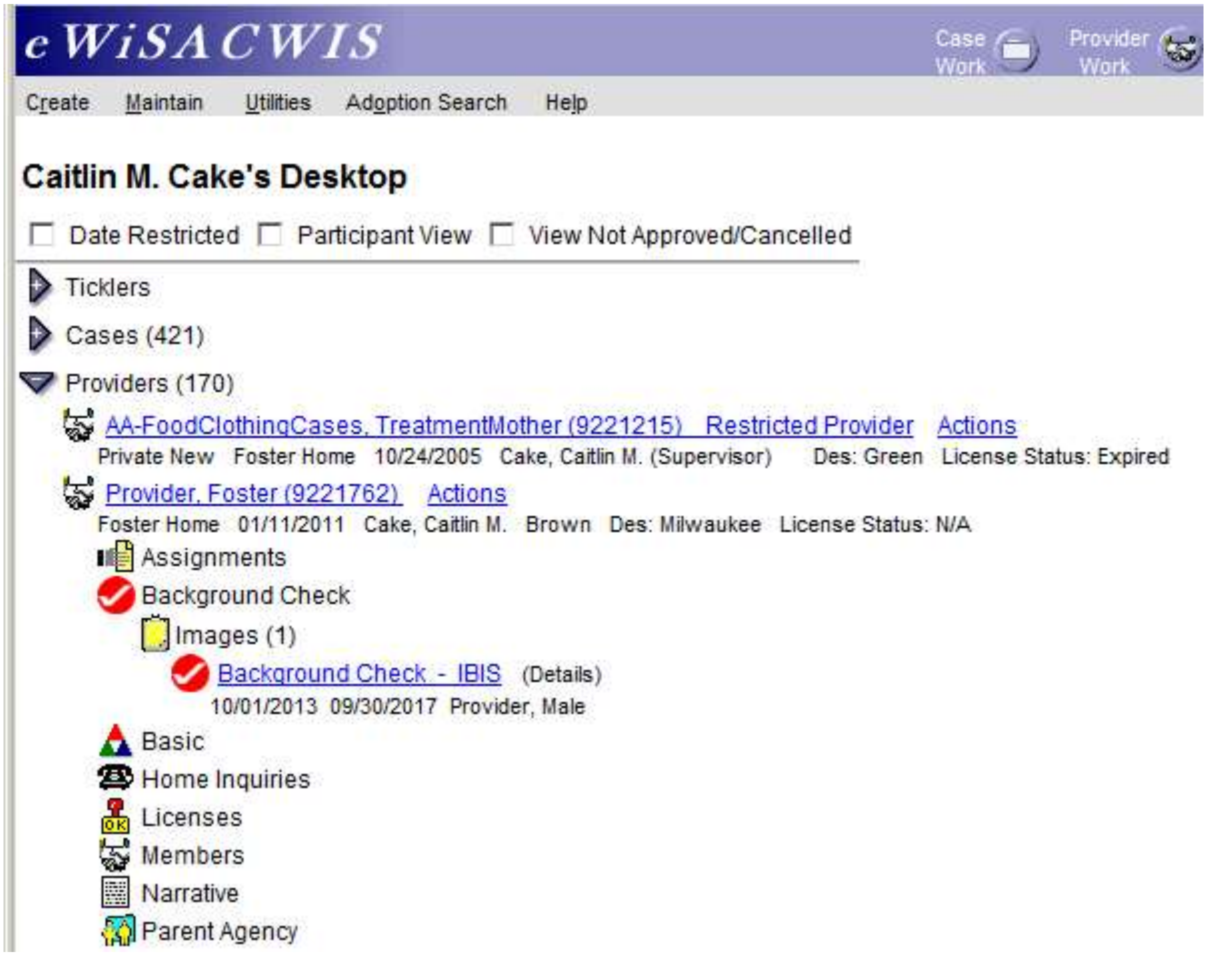
11. Click Close. This will return you to the Person Management page.

12. The Additional tab will display the background check information.



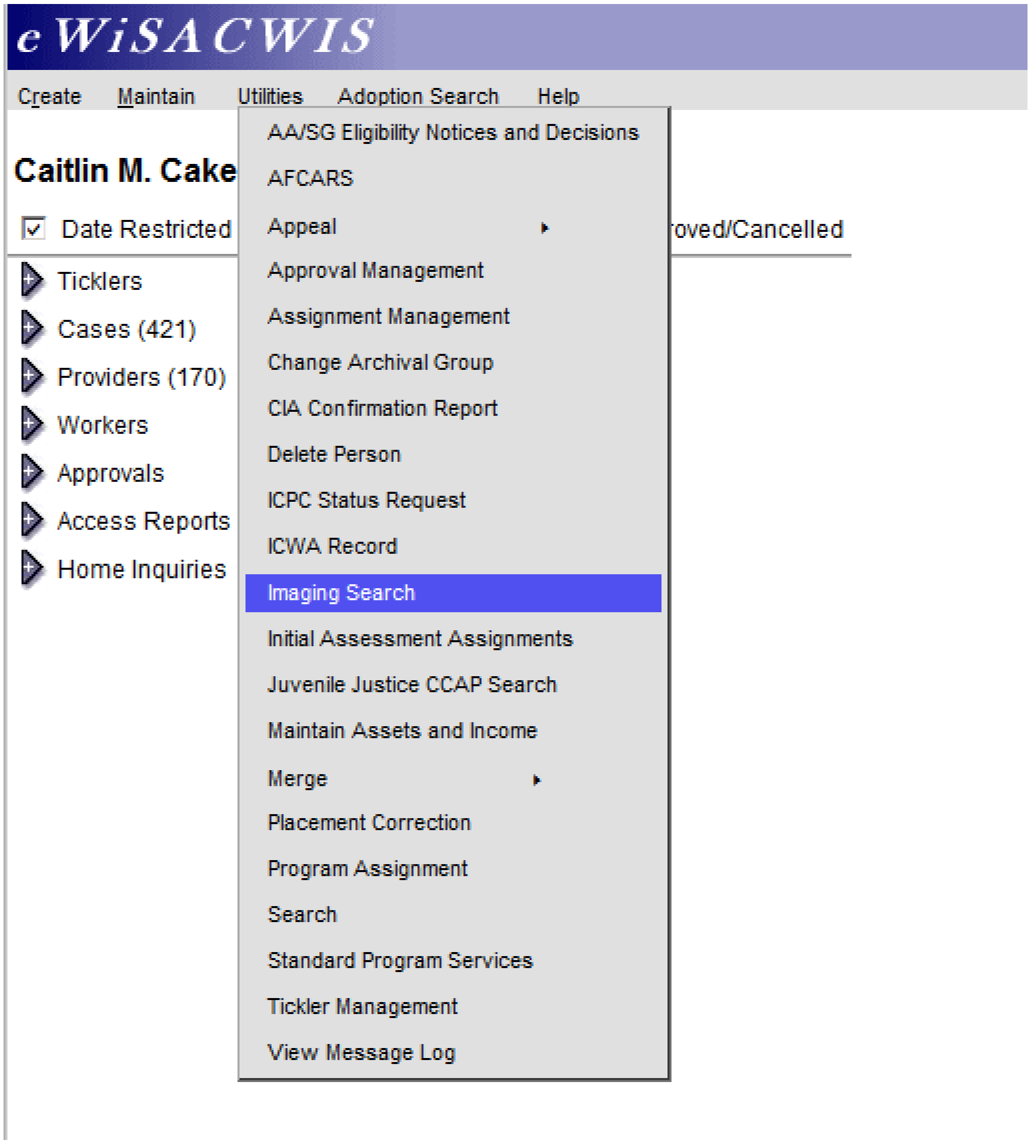
13. Click Close. This will return you to the desktop.

14. On your desktop, click on the home provider's icon to refresh the provider. Then click on the Background Check icon. You will see the Images icon. Expand this icon to display the background check.

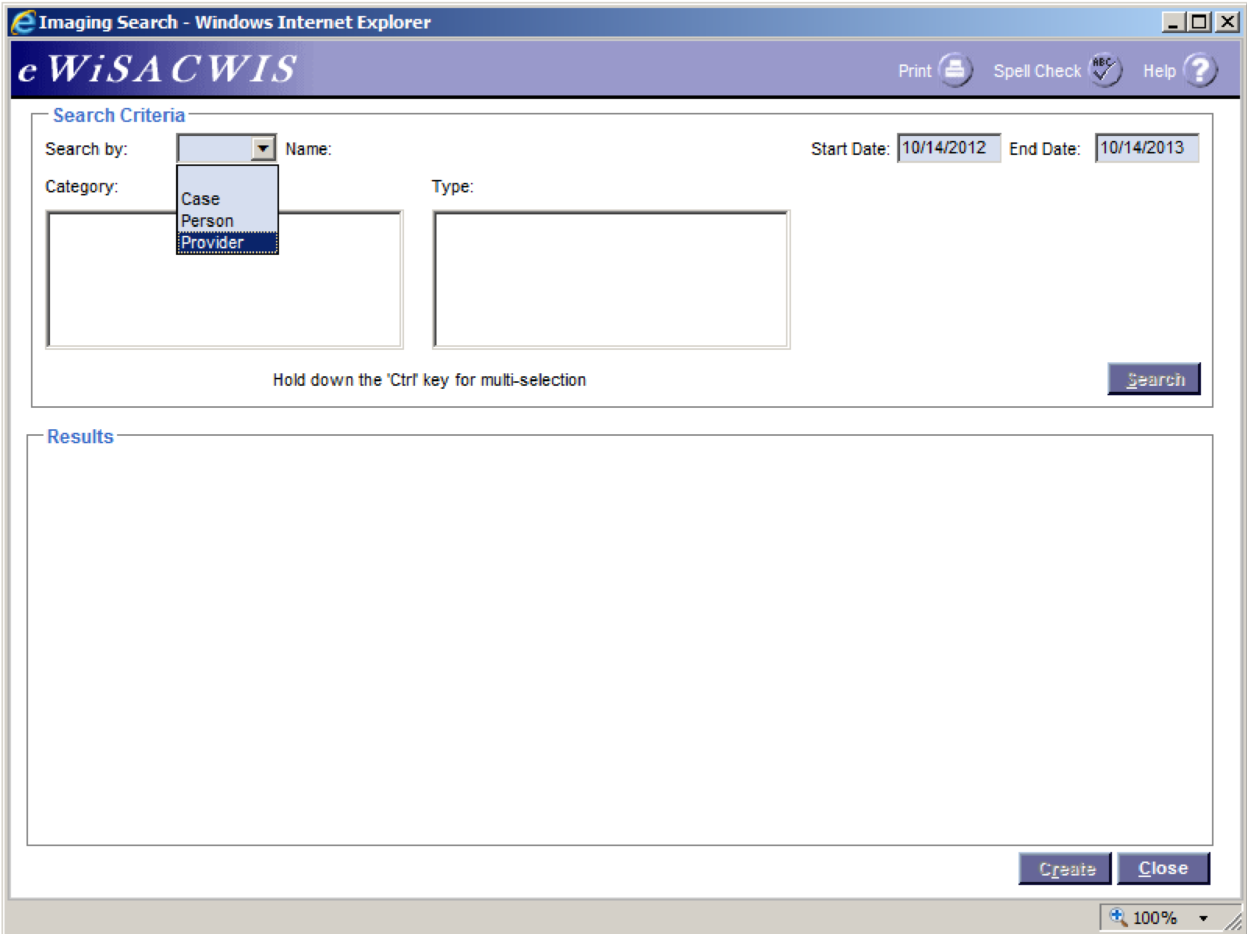


If you do not have an assignment to the provider:

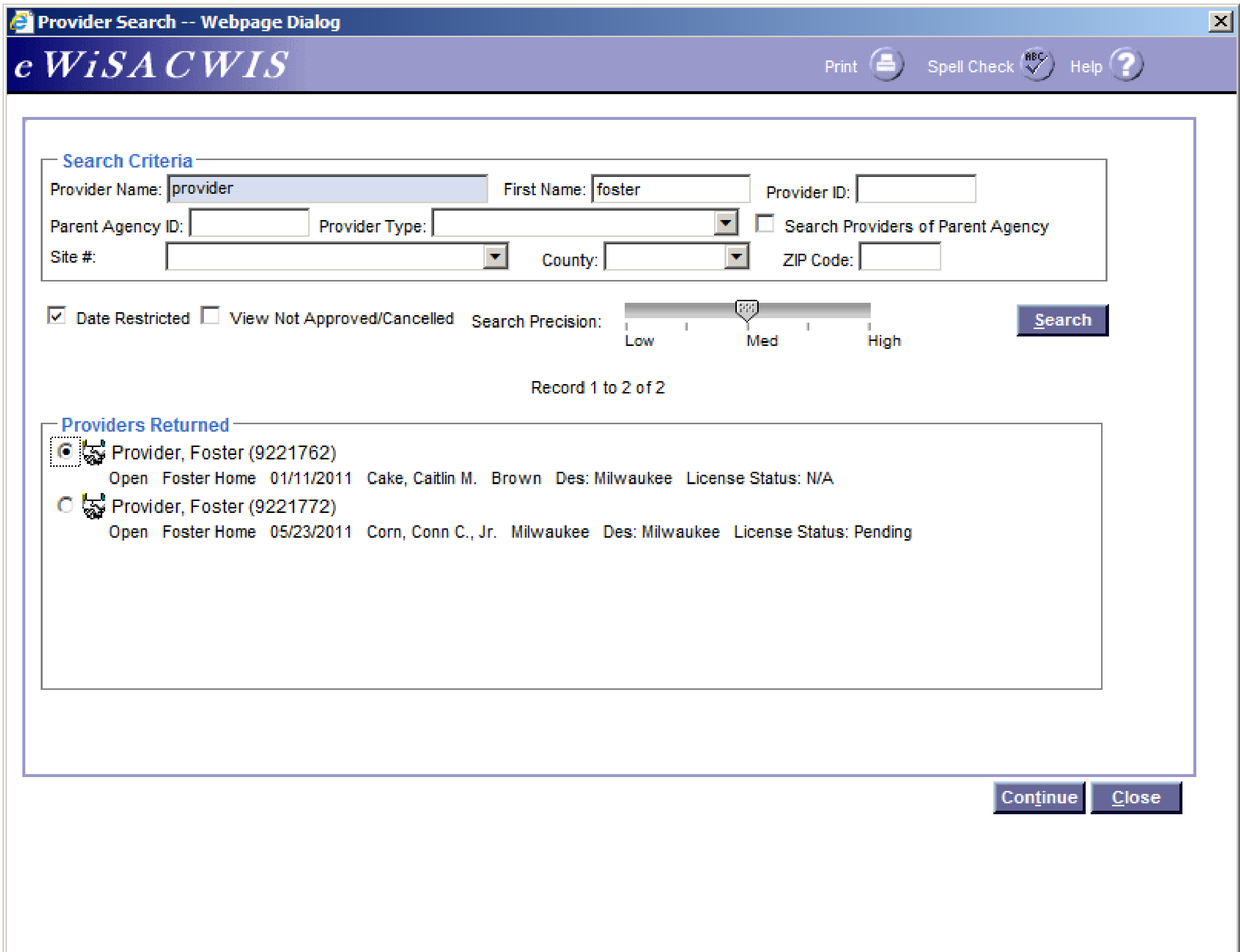
1. From the desktop, click Utilities > Imaging Search. This will open the Imaging Search page.



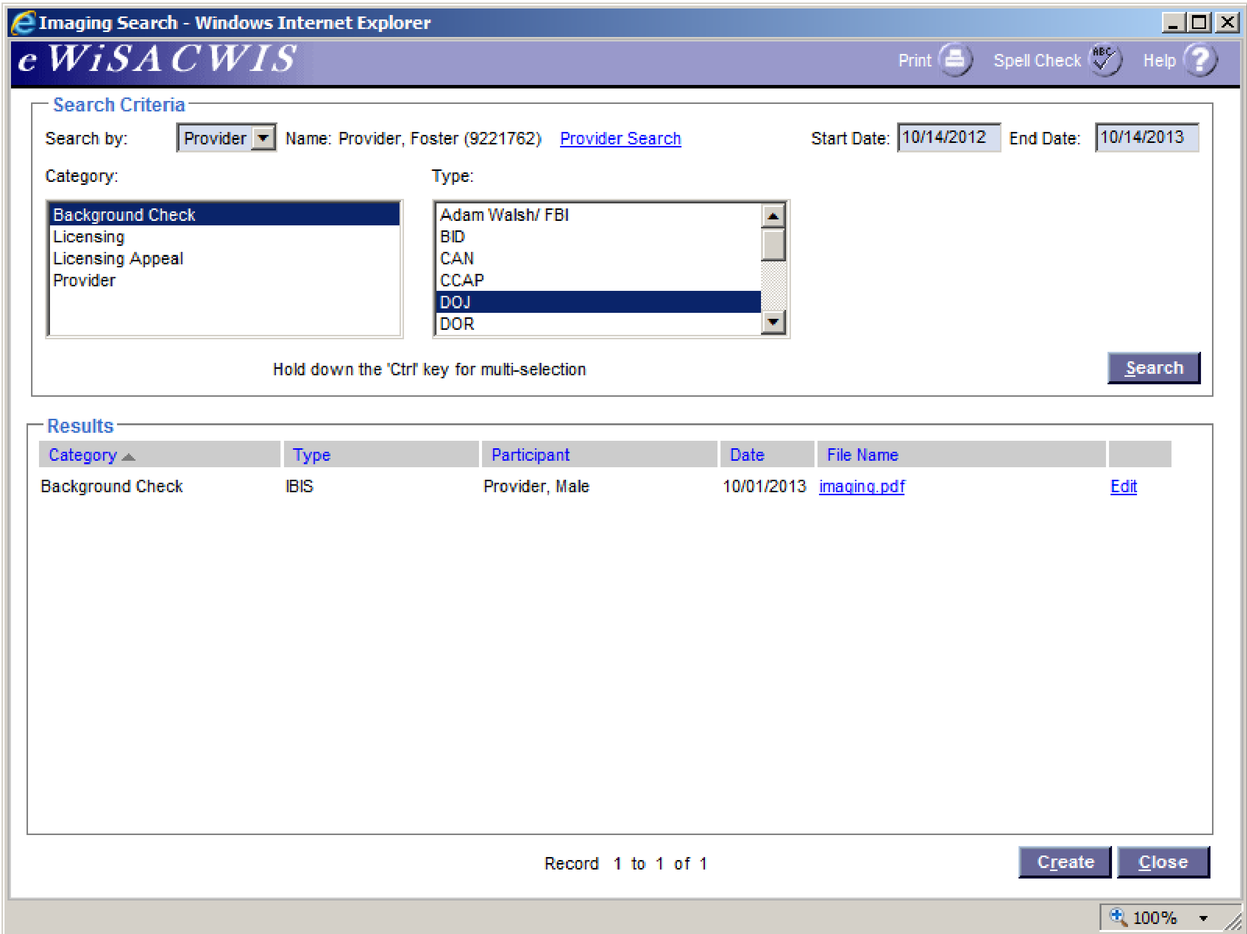
2. On the Imaging Search page, select Provider in the Search by drop-down. This will open the Provider Search page.



3. On the Provider Search page, enter the Provider Name or Provider ID to conduct your search and click Search. In the Providers Returned group box, select the radio button next to the correct provider and click the Continue button.

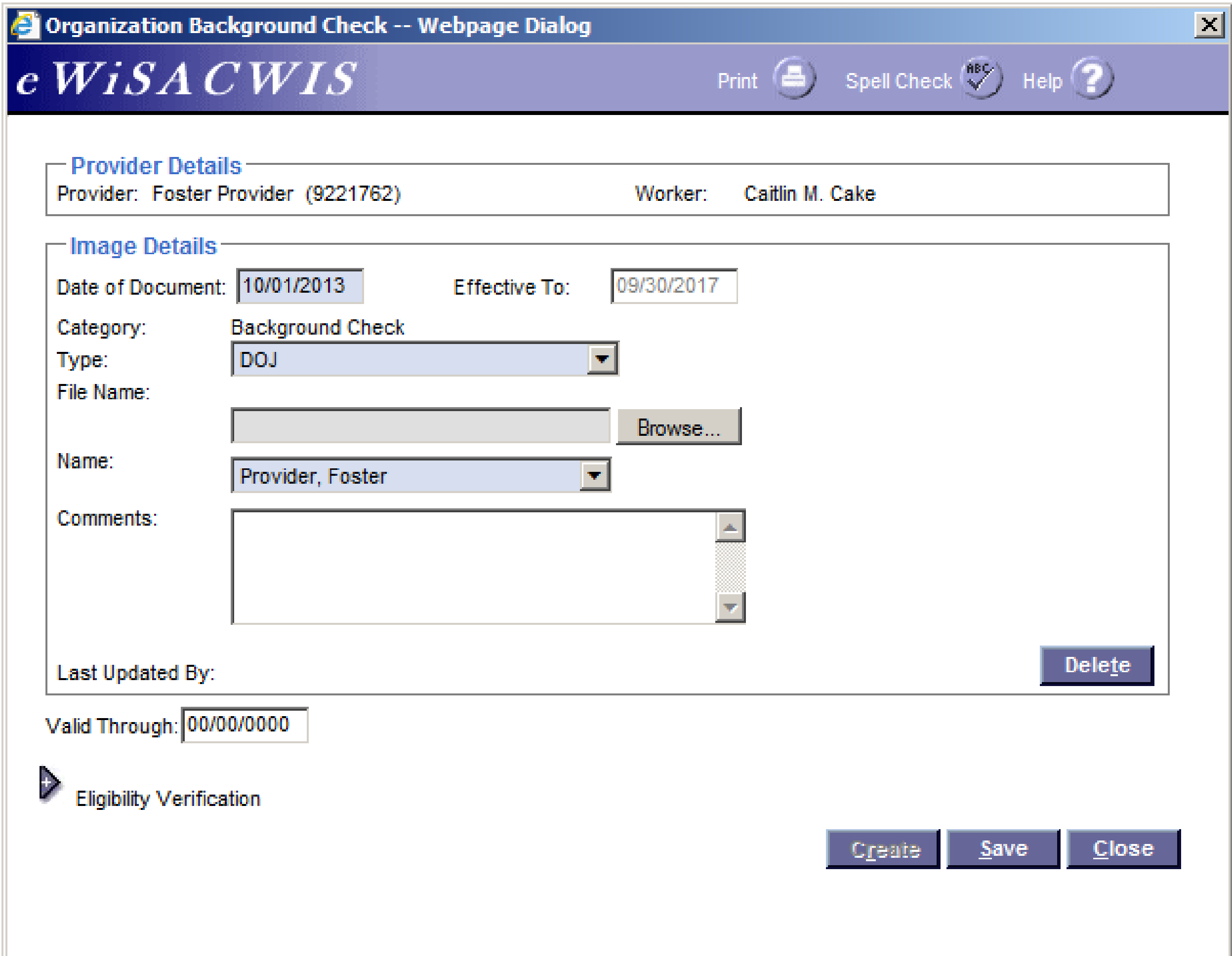


4. This will bring you back to the Imaging Search page. The page will now display all documents for the provider. The results will display all documents from the past year, unless the Start Date and End Date have been updated. To add a document, select the 'Background Check' Category and select the appropriate Type of background check. Click Create.



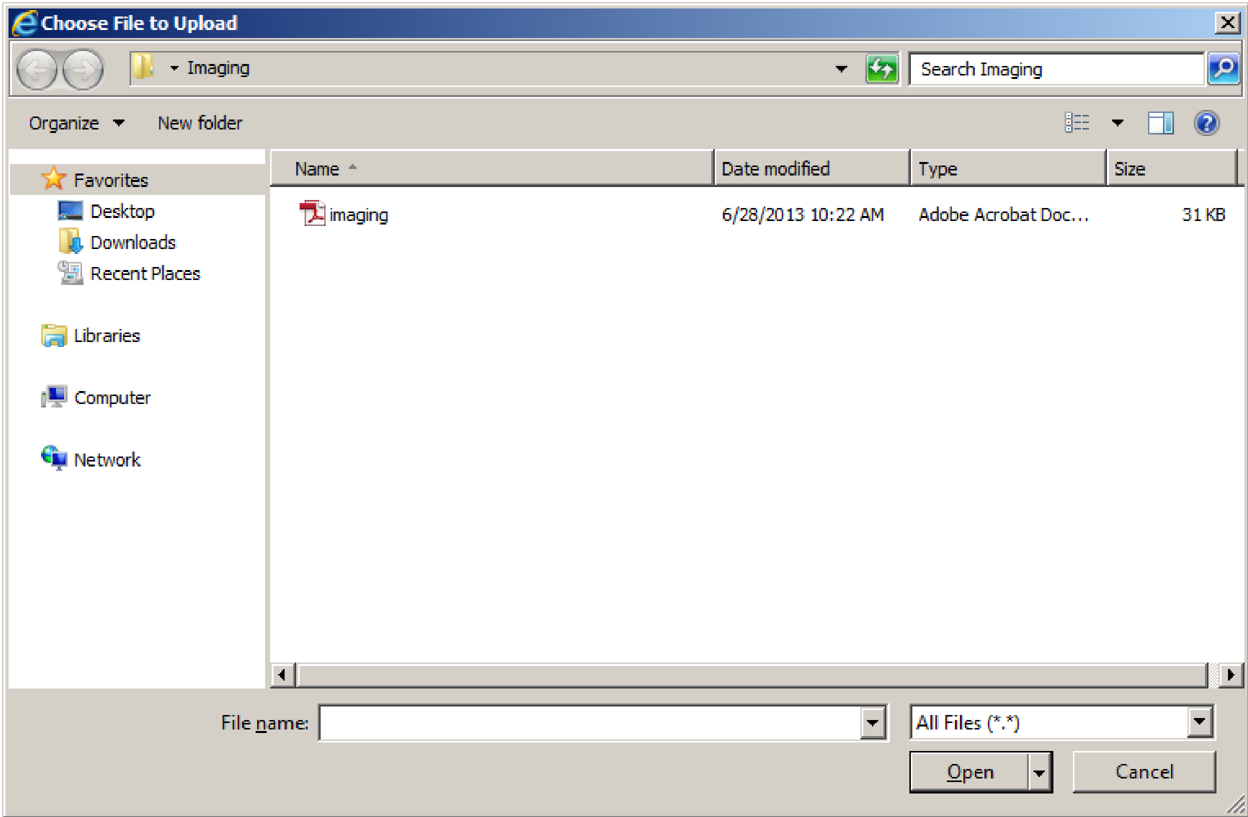
5. On the Organization Background Check page, enter the Date of Document, Effective To date (if applicable), and select the Type if you have not already done so.

Note: If the Type DOJ or IBIS is selected, the Effective To date will pre-fill to 4 years and will not be editable.



6. To attach a previously saved background check, select the Browse button. This will open the Choose File to Upload pop-up page.

7. Select the file from the appropriate location/folder. Once the file is selected, click the Open button.



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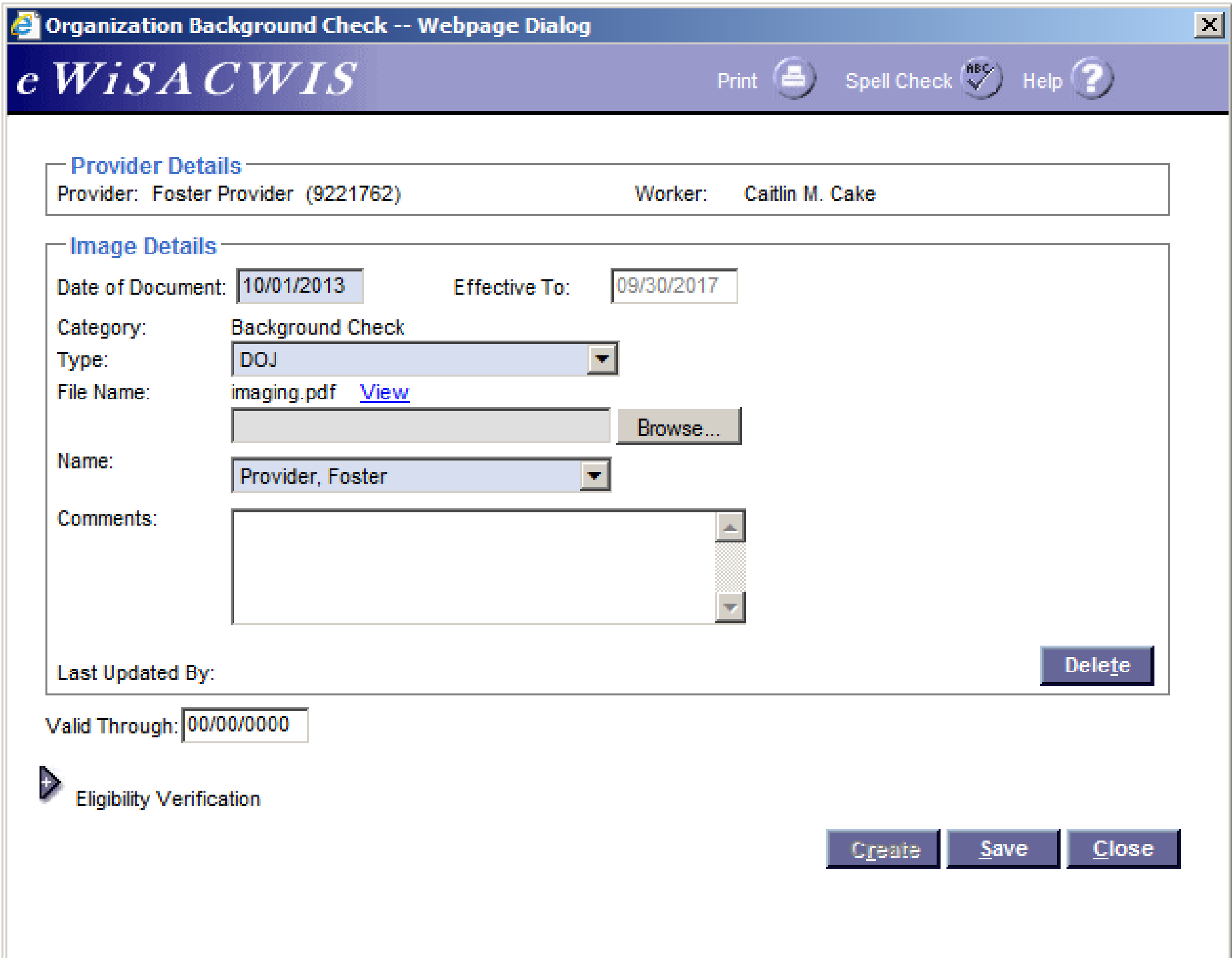


8. You can view the document by selecting the View hyperlink next to the File Name.

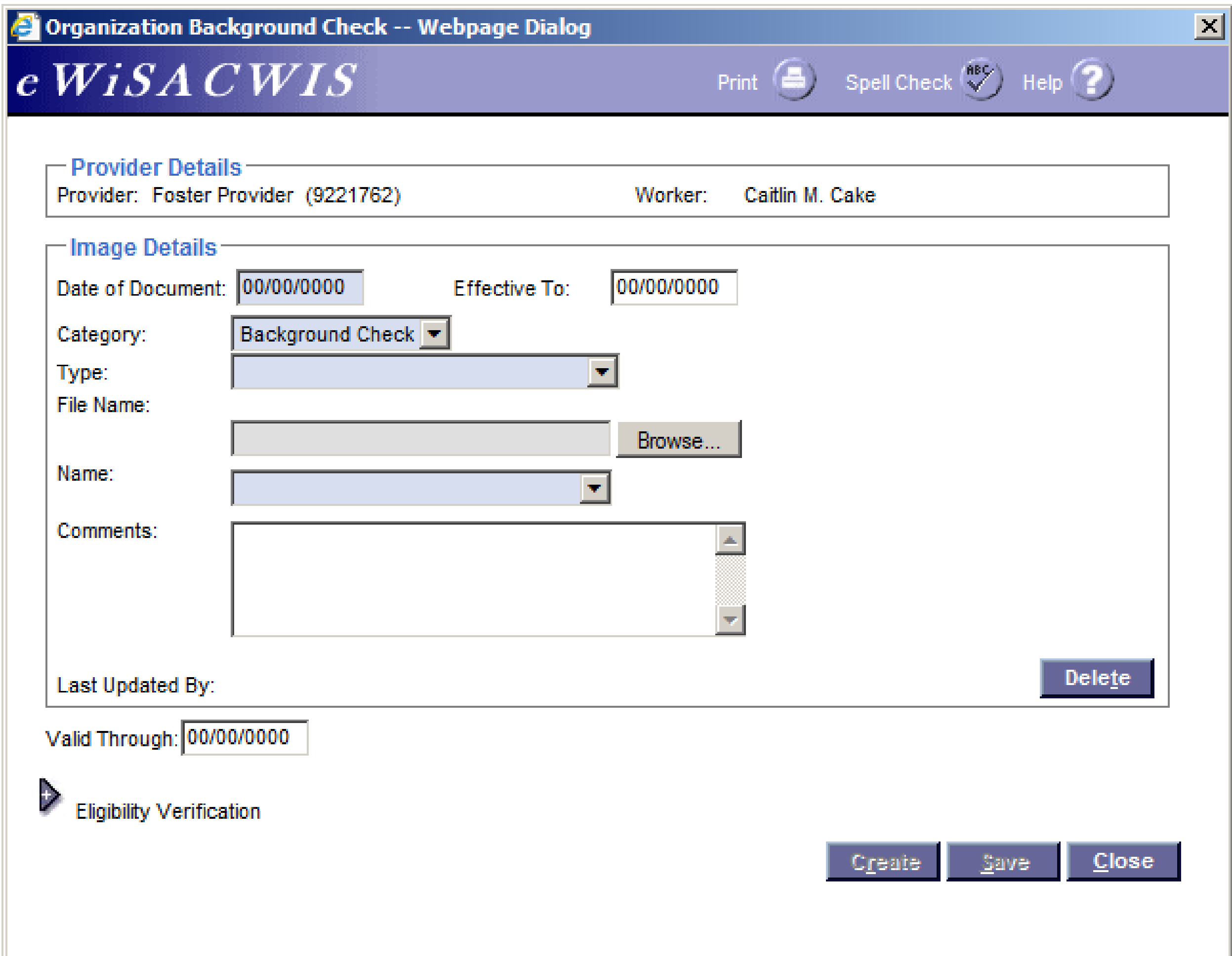
9. Enter any comments in the Comments field.

10. The Valid Through date identifies when a background check is no longer applicable or effective when the date is prior to the Effective To date. The date is used in revoked or closed license scenarios.

11. When all required fields have been completed, click Save. After clicking save, your name will appear in the Last Updated By field.

12. If the background check has been added for the wrong provider, click Delete to remove the image. If the background check has been added for the wrong member for this provider, update the Name drop-down with the correct provider member.

13. At this point, you can add a new background check for this provider by selecting the Create button. By clicking the Create button, this will open the Organization Background Check page with the same Category selected.



14. After you have entered all applicable information, click Save. Then click Close.

15. You will return to the Imaging Search page. The page will display all scanned background checks for the provider. To view the image for a particular result, click on the blue hyperlink in the File Name column to access the scanned document directly, or click the Edit hyperlink to access the associated Imaging page. To add additional background checks documents, repeat the above steps.